Your Downloadable Guide

Hope Act Committee Workspace Hub

A clear, welcoming guide to finding your next step, sharing progress, and staying connected.



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Getting Started

The Hub has its own sign-in. Each member uses their own Hub account.

First Visit

Accept Your Invitation

1. Open the account invitation sent by the Administrator.
2. Read the **Terms & Conditions** and **Privacy Policy**, then check both acknowledgment boxes.
3. Choose your username and a password of at least 15 characters. A memorable phrase works well. Confirm it and choose **Open My Hub**.
4. Visit **Password Recovery** and save your recovery codes somewhere private.

Returning Visit

Find Your Next Step

1. Open the Hub. Use **Sign In With A Passkey** if you have set one up, or use your existing username and password sign-in.
2. Choose **Menu → Workspace**. Look for **My Next Step**.
3. Use **Choose My Work** to select commitments you want to follow.
4. Open a commitment to read its owner, next step, and due date.

Your Menu Follows Your Access. Everyone sees the shared workspaces. Email and management controls appear only when your account has the relevant permission. **Admin Tools** belong to the Administrator.

Easy Sign-In

Open the Hub on your own phone or computer. Sign in and choose **Account → Two-Step Sign-In**.

Step 1

Confirm It’s You

Enter your current Hub password and choose **Continue**. Only if you already have verification set up, enter your existing authenticator or saved backup code.

You can leave the device name as it is. Changing it is optional.

Step 2

Create Your Passkey

Choose **Create My Passkey**. Follow the save prompt on your device, then confirm with Face ID, a fingerprint, or your device PIN.

You don’t need a new app, phone number, or text message.

Step 3

Save Backup Codes

Choose **Download Backup Codes**. Check that the file is saved somewhere private and separate from your device.

Check **I Have Saved My Backup Codes**, then choose **Finish And Sign In**.

Next Time: Choose **Sign In With A Passkey** on the welcome page. Your device handles verification. The Hub never receives your face scan, fingerprint, or PIN.

What If I Lose Access To My Device?

Use another enrolled passkey, an existing verification method, or a saved passkey backup code with your Hub password. Each code works once. Password reset does not remove passkey protection. Keep these codes private and never send them in an email or chat.

Can I Cancel Or Set This Up Later?

Yes. Choose **Cancel** or **Cancel Setup** before completion. Existing passkeys stay in place. After a successful save, finish by keeping your backup codes and signing in again.

What Happens To My Other Connections?

A completed passkey change signs out other Hub sessions and disconnects private calendar or spreadsheet links. Reconnect those links after signing in if you use them. Existing authenticator protection remains available.

Your Work And The Tracker

The Tracker gives the committee a shared view of work, owners, and dates.

Menu → Workspace

Share A Progress Update

1. Open your commitment and choose **Update Progress** or **Share My Progress**.
2. As an assigned owner, choose **Not Started**, **In Progress**, **Needs Support**, or **Completed**.
3. Keep the **Next Step** current, describe a blocker if needed, and add a short progress note. Evidence is optional.
4. Choose **Save Status Update**. Wait for **Status Updated**; the change is recorded directly without approval.

Notes and evidence stay visible to you and the Administrator; the next step and blocker are shared. Choose **Mark Completed** when finished. Completion notes and evidence are optional. Wait for **Task Completed**. The Tracker, Gantt, dashboards, and reminders reflect the status. **Reopen Task** preserves the earlier completion in Progress History.

Open In The Hub

Menu → The Tracker

Read The Shared Timeline

1. Filter by owner, pillar, or status to focus the view.
2. Select a task or its timeline bar to see the details.
3. Read the next step and check the orange date. Tasks without confirmed dates remain visible.
4. Use the task’s update action to report progress or ask for support.

Assigned owners update status, next steps, blockers, and completion directly. Other members share notes without changing status. Every member can create tasks and archive or restore old work. The Administrator can edit task details and shared schedules.

Open In The Hub

Choose	Contribute	Share	Complete
Find one useful commitment.	Do the work or ask for support.	Save your note and evidence.	The owner marks the finished task completed.

Every Member: Create And Archive Tasks

Every member can choose **New Task** in The Tracker, My Work, or a pillar workspace. Add a task name, owner, first step, and pillar. Add dates when confirmed. The task calendar has month and year menus, with years from 1900 to 2199. If an older saved date is invalid, choose the correct date; the Hub does not guess it. Choose **Save Task**, then **View Task In The Tracker**. If a save times out, retry the same save rather than creating a second task.

Archive Old Tasks Without Losing History

Choose **Archive Task** on a My Work card or in task details, then confirm. The task leaves active lists while keeping its progress, completed status, evidence, and links in meeting records. Every member can open **Archived Tasks** in My Work and choose **Restore Task**. Restoration keeps the earlier task status.

Set A Personal Task Reminder

1. Open **The Tracker** and select a task or timeline bar.
2. Choose **Remind Me** beside the progress controls.
3. Confirm the task name and due date. Choose 1 week, 3 days, or 1 day before the due date; on the due date; or a custom date and time.
4. Choose **Save My Reminder**. Check the saved date, time, and time zone. Due-date options use 9:00 AM in your device's time zone and follow later changes to the due date.
5. Use **Change Reminder** or **Remove Reminder** in the task details. Reminders are personal to your account.

A time that has already passed requires a future custom date. Tasks without a due date can use a custom reminder. The Hub does not send reminder emails or text messages.

Read And Filter The Gantt View

Choose **30 Days, 90 Days, 6 Months, Year,** or **Fit All**. Use Today or the period buttons to move through dates. Group by Pillar, Workstream, or Owner, then expand or collapse groups. Filter by status, priority, owner, Due Soon, Overdue, Blocked, or Milestones. Due Soon means the next 7 days.

The Today marker, task status, dated milestone markers, blockers, and recorded dependency links help show the work ahead. Select a task to open its detail panel while keeping your timeline position. Use Update Progress, Mark Completed, Remind Me, or View In The Tracker. Progress History shows recorded changes and their dates. Administrators can use Schedule and date fields; dragging is optional.

Three Useful Dashboards

My Dashboard: assigned tasks, work due this week, personal reminders, changes waiting on you, support requests, and assignment notices. Owner-name matching must be unambiguous; following a task does not change its owner.

Committee Dashboard: active, completed, due-soon, overdue, and blocked tasks; four-pillar progress; upcoming milestones; and recorded workloads. Click a number or pillar to see its records and open the exact task set in Gantt.

Executive Dashboard: for leadership accounts. Review decisions, critical milestones, at-risk work, blockers, meeting records awaiting action, and the stewardship and policy records your permissions allow. Workload and support requests are discussion indicators, not estimates of available hours. Click Needs Attention to inspect the underlying work.

All four pillars are supported: **Policy Delivery, Member Care, Financial Stewardship, and Medical Advocacy.** Shared Coordination remains available for cross-committee work.

Export The Project Plan

Take a polished, portable copy of the committee's saved work into a meeting or another planning tool.

The Tracker → Export Project Plan

Prepare And Save Your File

1. Open **The Tracker**. Set any pillar, owner, status, priority, or focus filters you need.
2. Choose **Export Project Plan**. Select **Full Project Plan** or **Current Filtered View**. The current Group By setting organizes the PDF and Excel task register.
3. Choose **PDF**, **Excel**, or **CSV**, then **Prepare Export**.
4. Wait for the ready confirmation and task count. Choose **Save PDF**, **Save Excel**, or **Save CSV**. For PDF, **Open PDF** is also available.

Choose The Format That Fits

PDF

A polished overview, progress across all four pillars, task milestones, a dated timeline, and readable task details.

Excel (.xlsx)

An editable Overview and Project Plan. Filter task columns, sort real date cells, and keep task names and headers visible with frozen panes. Open in Excel or import into another tool that supports XLSX.

CSV

A clean task register for spreadsheet and project-management tools that accept CSV. Map Task ID, Owner, Due Date, Status, and Dependency Task ID to the destination's fields.

What Your Copy Includes

Task names, owners, pillars, workstreams, statuses, priorities, start and due dates, next steps, milestones, dependency references, shared blockers, and record versions come from saved Tracker records. Missing dates stay unconfirmed. A dependency outside a filtered export is labeled. Summary counts reflect only the exported tasks; overdue and blocked flags reflect the export date.

The PDF covers **Policy Delivery, Member Care, Financial Stewardship, and Medical Advocacy**, plus Shared Coordination where used. Private reminders, progress notes, evidence links, meeting source documents, and member-care records are excluded.

The files are a dated copy. Editing an exported file does not update the Hub. Save your Hub changes first, then prepare a new export when the plan changes.

Resource Center → Export Project Plan also prepares the full shared plan. The existing planning workbook, Plan Snapshot CSV, and other permitted reports remain available.

Financial Stewardship

Connect committee commitments to funding requests, recorded decisions, and reviewed monthly figures.

Menu → Financial Stewardship

Start A Funding Request

1. Select **New Funding Request**. Choose Expense, Grant Application, or Reimbursement.
2. Explain the purpose and expected result. Enter the amount, budget line, proposed payee or funder, and any confirmed date.
3. Choose the related commitment. Add restrictions and a controlled supporting reference when needed.
4. Choose **Save Draft** to keep the request private, **Submit For Review** to share it with the Administrator, or **Cancel** to leave the form.

Open **Requests** to follow the review. If more information is requested, use **Edit My Request** and resubmit. You can withdraw your own pending request; its record and history remain.

Committee Funds Stay With The Organization. A request does not authorize spending, submit a grant application, or move money. Never collect or hold committee money in personal bank or payment-app accounts.

Read The Monthly Update

Overview shows the latest published update. Select **Read The Update** for the budget, payments, unpaid commitments, restrictions, and next actions. **Download Summary** saves a text copy.

Opening balance + receipts - payments = closing balance. A closing balance is not permission to spend. Restricted funds remain limited to their allowed purpose.

For The Administrator

Use **Review & Route** for submitted requests, then record the actual organizational decision and its authority reference. Record payment only after authorized finance completes it. App access does not grant financial authority.

Under **Administrator · Financial Reporting**, prepare a monthly update, record reconciliation and independent review, then publish. Use **Record Roles & Adoption** only when actual appointments and adoption are confirmed.

Unsubmitted drafts are private to their author. Submitted requests and their later updates are shared with the Administrator. Members see published summaries, not private source references. Keep bank details, receipt contents, and confidential Board records outside this workspace.

Create A Budget Proposal

Open **Financial Stewardship → Budget Proposals**. Choose a starting template and select **Create A Budget Proposal**. The Hub creates a private draft you can return to later.

1. **Your Idea.** Give the proposal a clear name. Explain what you want to do, who benefits, what success looks like, the dates, and who is responsible.
2. **The Costs.** Add each item or service, its quantity, and price. The Hub calculates the item total. Explain where each estimate came from. Template prices start blank, and unpriced items are excluded from provisional totals. Include taxes and delivery where needed. An allowance for unexpected costs is optional and needs a reason.
3. **The Funding.** List existing sources as Confirmed or Pending. Only confirmed amounts reduce the funding still needed. Record restrictions and timing. Describe donated time, goods, or space separately from cash.
4. **Review & Share.** Say how spending and results will be checked and who should review the proposal. Complete the missing-details list before submitting or preparing an email.

Choose Your Next Step

Save Draft keeps the proposal with you. **Submit To Administrator** shares it for review. A proposal does not authorize spending or confirm a funding award. Use the normal funding request process to record an organizational decision.

Generate PDF downloads the saved version with costs, funding, and the proposed results. Incomplete proposals are marked as working drafts. Check the downloaded file before sharing it.

Send Budget Proposal lets permitted senders choose a committee contact or enter an email address, then edit the message. Acknowledge that the message and PDF will be shared with the Coordinator Circle. Select **Attach PDF & Review Email** to open the saved email in Committee Inbox. Delivery occurs only after **Confirm And Send**.

Budget Guide

When its conversation service is connected, Budget Guide helps explain costs and suggests wording. Suggestions stay separate until you review and apply them. When it is not connected, the forms, templates, PDF downloads, and email preparation remain available. Keep banking details and sensitive personal information out of proposals and conversations.

Policy Sprints

Each sprint holds one question, the options, evidence, and the committee’s developing position.

Eligibility

Who qualifies for review?

Review Criteria

What should the review consider?

Review Timing

When should the first review happen?

Who Decides

Who is the reviewing authority?

Reentry Supports

What should release come with?

Victims And Survivors

What is their role in the process?

Add Your Contribution

1. Choose **Menu → Policy Sprints** and open an active sprint.
2. Read its question, options, and open questions.
3. Choose **Add My Contribution**. Add research, an option, a question, or a leaning.
4. Explain your contribution, include a source when useful, and save it.

Open In The Hub

Organize The Sprint

Use **Add Sprint** for a new question. Use **Set Up This Sprint** or **Edit Sprint & Options** to develop existing work. Choose **Save Sprint** or **Cancel**.

Archived work stays in the record. **Delete Sprint → Move To Trash** is recoverable through **Restore Sprint**. Recorded positions preserve their adopted wording; revisions require a new committee decision.

Policy & Legal Researcher: Open **Menu → Committee Tools** to start a research question, add sources, compare findings, and request review. Findings and source checks are entered by people; automated web research is not connected.

Meeting Agendas And Minutes

For coordinators with Meeting Management & Imports permission.

Plan The Agenda Before The Meeting

Menu → Meeting Agendas

1. Choose **New Agenda**. Add the title, meeting date, and invited participants.
2. Plan topics, presenters, time estimates, purpose, and any linked active tasks. Save the agenda as Draft or Ready.
3. Use **Download Agenda** to share the outline. Archive old agendas and restore them when needed.
4. When ready to record the meeting, choose **Start Minutes**. The outline is copied into a separate minutes record.

Actual attendance, notes, decisions, and follow-ups start empty. The saved agenda version stays attached as a planning reference. Later agenda edits do not change existing minutes; saving minutes does not rewrite the agenda.

Upload Minutes Directly To The Tracker

1. Open **The Tracker → Import From Minutes**, or **Meeting Minutes → Upload Minutes To Tracker**.
2. Upload minutes for automatic analysis, or paste text and choose **Analyze Minutes**. TXT, Markdown, VTT, SRT, DOCX, and text-based PDF are supported.
3. Review the compact task summaries. Claude fills supported owners, dates, pillars, next steps, and stated prerequisites. Choose **Needs Review** for exceptions or **Edit Details** for corrections.
4. Use **Fill Missing Owners Or Dates Together** to apply your chosen values only to empty fields. Select a proposed action to confirm it. Choose **Save Tasks To Tracker** to save the selected batch without an agenda or finalized record.

Clear, complete assignments arrive selected. A prerequisite can be another selected action or an existing task. Missing and ambiguous facts need confirmation; dates and owners are never invented. Exact existing tasks are reused without changing them.

Claude reads the meeting date from the minutes. If it is missing, add it under **Analyze Again With Claude** and reanalyze before saving. Unsaved older built-in imports can be upgraded; saved task history stays protected.

From **Import Draft Minutes**, choose **Create Tracker Tasks From These Minutes** to use the same upload directly. Existing imported drafts offer **Create Tracker Tasks From Source**.

Source text stays linked to tasks. Assignment notices are optional and Hub-only; each member chooses their own reminder. Direct import does not finalize governance records.

Record The Meeting Minutes

Menu → Meeting Minutes

1. Open the minutes started from an agenda, or choose **New Minutes** to start an independent record.
2. Record actual attendance, discussion notes, decisions, and follow-ups under each topic.
3. Give each confirmed follow-up an owner, next step, and exact due date.
4. Choose **Save Minutes**. Review the actual record before finalizing.

Upload Raw Or AI-Generated Minutes

1. In Meeting Minutes, choose **Import Draft Minutes**. Paste raw text or upload TXT, Markdown, VTT, SRT, DOCX, or a text-based PDF. Files may be up to 10 MB; extracted text is limited to 80,000 characters.
2. Choose **Organize Draft Minutes**. The format assistant recognizes Markdown action tables and labeled Task, Owner, Due Date, Pillar, Priority, Next Step, and Workstream fields. It keeps unfamiliar fields and dependency descriptions in source notes.
3. Confirm the meeting title, exact date, and participants. Explicit source metadata can fill these fields when you have not entered them. Review each candidate decision and action; missing owners and relative dates remain unconfirmed.
4. Choose **Create Draft Minutes**. Edit the draft in Meeting Minutes and compare it with the source. Importing does not finalize minutes or create tasks. Confirm actual decisions, assignments, dates, and member-facing content before finalizing.

Record Or Import	Review	Finalize	Follow Through
Start minutes or import meeting notes.	Check what was said and agreed.	Share the approved meeting record.	Review and select confirmed actions for The Tracker.

A Draft Still Needs Your Judgment. Import Draft Minutes uses the built-in format assistant to organize source wording. This draft workflow does not send text to an external AI service, invent decisions, transcribe audio, or read scanned images. Direct Tracker imports use Claude only when Minutes Intelligence is connected. Extracted source text is retained for review; the original uploaded file is not stored. Keep your original file separately. Imported drafts and source text are limited to permitted coordinators and the Administrator; finalized minutes are shared with members. Review confidential information before finalizing.

Open In The Hub

Find A Time With Meeting Scheduler

Menu → Committee Tools → Meeting Scheduler

1. A permitted coordinator chooses **Create Availability Poll**, enters the title, duration, joining details, and up to 24 future time options.
2. Members open the poll and choose **Yes, Maybe, or No** for each time, grouped by day. **Yes To All** and **No To All** set a starting point. Adjust individual choices and choose **Save My Availability**.
3. **Results** ranks saved response totals by Yes, then Maybe. A coordinator chooses **Confirm This Time** for a future option. Members can then download a calendar copy, or use Connections for a subscription.

Times use Central Time, including daylight saving. Individual answers are private; aggregate totals are shared. Opening a poll does not send invitations. Use **Active, Cancelled, Archived,** and **Trash** to organize proposals. Coordinators can cancel open polls, archive confirmed or cancelled proposals, and move cancelled proposals to Trash. Restore retains the earlier status; cancelled proposals stay cancelled. A proposal linked to finalized minutes must be archived rather than deleted.

Finalize The Record, Then Review Its Actions

1. Save and review the draft. Authorized coordinators can edit, cancel, or delete drafts; the audit history remains.
2. Choose **Review & Finalize Minutes**, then **Finalize Minutes**. This saves the final record without creating tasks.
3. Choose **Review Actions For The Tracker**. Select the confirmed actions you want to create.
4. Review or edit each Task, Owner, Due Date, Pillar, Priority, Next Step, optional Workstream, and Dependency. Existing tasks are labeled Already In The Tracker and are not duplicated.
5. Create the selected tasks. Open a task to set your own personal reminder. If needed, review the assignment notification and choose to notify matching owners in the Hub. This does not send email, subscribe members to communications, or create their private reminders.

Archive And Restore Meeting Records

Meeting Minutes has **Active, Cancelled, Archived,** and coordinator-only **Trash** views. Search by title or meeting date. Open a saved record and choose **Archive Meeting** to keep it out of Active while preserving its notes, original source text, versions, and linked Tracker tasks. An archived record is read-only; restore it before editing or starting a correction.

Authorized coordinators can choose **Delete Draft** or **Delete Meeting** for unfinished or cancelled records that were never finalized. This moves the record to Trash without erasing its history. Open it in Trash and choose **Restore Meeting** to return it to its previous view and status. Older deleted drafts restore as cancelled records. Save or cancel unsaved edits before organizing a record. Finalized and voided governance records cannot be deleted.

Correct A Final Record Without Losing It

Finalized minutes offer **View Final Record, Correct / Amend, Supersede, Export,** and **Version History**. They cannot be edited or deleted as ordinary drafts. Correct / Amend and Supersede require a reason and create a separate linked draft. Save, review, and finalize the new version when ready. The history identifies who changed the record, when, why, and the preceding version.

Only the Administrator can **Void Finalization**, with a reason. The record, earlier versions, existing tasks, and audit history remain available. Voiding does not retract tasks or recall previously exported minutes. Use a new reviewed version to document the correction.

There is no automatic undo period after finalization. Check the review step before confirming. For a printable export, open the final record and use the print/save-PDF control; text export remains available.

Shared Calendar And Connections

Every signed-in member can see the Hub’s schedule.

Menu → Shared Calendar

See What Is Coming Up

Choose **Month, Week,** or **Agenda**. Select an event for details or a date for its agenda. Use **Go To Date**, **Today**, or period arrows. Filter meetings, milestones, tasks, and sprints. On phones, **Back To Calendar** or **Back To Week** returns to the dates.

Times use **Central Time**. Details link to the task or work area. **Join Meeting** opens a saved link; **Add To My Calendar** downloads the meeting. Administrators can use **Add On This Day**.

The Administrator manages events. Use Meeting Scheduler in Committee Tools to share availability; authorized coordinators confirm meetings.

Open In The Hub

Menu → Connections

Use Your Own Calendar App

1. Choose **Connect My Calendar**.
2. Select **Shared Committee Calendar** or **My Commitments Only**, then create your private connection link.
3. Use your calendar app’s subscription-from-URL option. Follow the instructions shown in the Hub.
4. Keep the private link to yourself. You can disconnect it in Connections.

Your calendar app refreshes Hub dates. Personal appointments are not imported; invitations are not sent.

How Does The Spreadsheet Tracker Connect?

Open an available spreadsheet from Connections → Spreadsheet Tracker. Administrators manage the connector in Admin Tools → Administrator Settings → Spreadsheet Connection. Personal updates and member-care messages are excluded.

Manage My Reminders

Open **Connections → My Reminders**. Choose **Upcoming**, **Overdue**, or **Dismissed / Completed**. **Open Task** returns to the task and reminder controls. **Dismiss** clears active attention; **Remove Reminder** turns off your task reminder. Neither deletes the task.

1. On an overdue reminder, choose **Snooze**. Select a future date and time, then choose **Save Snooze**. Look for **Reminder Snoozed** and the reminder in Upcoming.
2. In **Dismissed / Completed**, choose **Restore Reminder** for a dismissed reminder. If its time has passed, select a future time and confirm. Look for **Reminder Restored**. Completed tasks stay completed; open the task to reopen the work if needed.
3. If a task’s due date is cleared, its saved reminder remains visible as **Due Date Needed**. Open the task to choose a custom reminder or add a due date. The due-date reminder follows the date when it is restored.

Reminder times use the saved reminder’s time zone, shown beside the time. The Snooze form uses your device’s time zone. Snoozing changes only your reminder.

Manage My Reminders sets advance notice or pauses reminders. Personal task choices take precedence. **Overdue** means the reminder time passed; **Task Overdue** means the deadline passed. Reminders are **Hub-only**; set calendar alerts in your calendar app.

Member Care And Engagement

A check-in can be a small step toward support, a manageable role, or renewed participation.

Share A Check-In

Menu → Member Care & Engagement

Share your capacity, interests, and what would help you stay involved. Read the audience notice, choose your follow-up preferences, and submit when ready.

New care submissions are shared with the Administrator and verified Circle members who have Member Care access. They do not appear in the shared Tracker or spreadsheet.

Some older check-ins retain their original private access until their author deliberately shares them with the Circle.

Open In The Hub

Use The Open Care Link

No Account Needed

Share hub.therealyb2016.com/member-care with someone who would like to reconnect.

1. Choose a named or anonymous message.
2. Read who can see the submission and send your check-in.
3. Save the private receipt link. Return to it to read replies or withdraw your message.

Replies are not automatically emailed. The anonymous option omits your name and email; details you write may still identify you.

Committee Email

Available to the Administrator and Circle accounts with Committee Inbox & Email permission.

Menu → Committee Inbox

Write Or Reply

1. Choose **Write An Email**, or open a received message and choose **Reply**.
2. Add the recipient, subject, message, and appropriate pillar. All outgoing emails use the Hope Act sun header and pillar icon. **Save Draft** keeps it for the Circle.
3. Choose **Review & Send**. Check the recipient and message, then choose **Confirm And Send**.
4. Look in **Sent** for acceptance status. You can archive received conversations and move them back to the inbox.

“Accepted For Delivery” means the delivery provider accepted the email. It is not a read receipt or proof that someone received it.

Open In The Hub

Menu → Member Care & Engagement

Invite Someone To Reconnect

1. Choose **Write A Member Care Email**.
2. Personalize the branded invitation and add members who agreed to committee emails.
3. Save and review the message and recipients before confirming the send.
4. Use **Drafts & Send History** to return to invitations. Each recipient receives a separate message with an unsubscribe option.

Care submissions are not automatically added to a mailing list. Check-in replies remain at the private receipt link unless someone separately writes an email.

Import Outreach And Community Engagement Lists

Committee Inbox → Outreach & Community Engagement

1. Choose **Import Contact Lists**. Export a spreadsheet as CSV, up to 5,000 rows and 2 MB, or download the template.
2. Use Name, Email Address, Organization, Categories, Email Permission, Consent Note, and Notes columns. Separate categories with semicolons and select a default category.
3. Review valid contacts, duplicates, invalid rows, and permissions. Subscribed contacts need a consent note; missing consent keeps the contact without making it eligible for mail.
4. Confirm the reviewed contacts, then import. Use **Edit Contact & Categories** to update a profile, and **Export CSV** to save a filtered list.

Imports preserve existing names and opt-outs. A contact can belong to multiple categories. Confirmed public subscribers appear in Community Engagement. Imported contacts do not receive Hub accounts or invitations.

Review And Send A Bulk Mailing

1. Filter the audience and choose **Prepare Bulk Email**. Select eligible recipients.
2. Choose the appropriate pillar, write the message, and add the organization's mailing address.
3. Choose **Save & Review Email**. The preview uses the Hope Act sun header, cream styling, pillar icon, and unsubscribe footer used for delivery.
4. Review the message and recipients, then choose **Confirm & Send Mailing**.

Each person receives a separate email. Progress is saved per recipient; opt-outs, bounces, and spam complaints are excluded. Choose **Pause After Current Batch** to stop after the current batch. Reopen the same saved campaign to resume; uncertain delivery retries keep the same message and duplicate-protection key. Saving a draft sends nothing.

Build Community & Partner Relationships

Open **Connections → Community & Partners** with Committee Inbox & Email permission. Administrators add profiles with organization, relationship, status, pillars, owner, next step, and follow-up date. Open a profile for contact history; **Log Follow-Up** records the contact and next step. Earlier entries remain available. Adding a profile does not send messages, enroll reminders, or grant Hub access. **Committee Contacts** opens the existing directory.

Committee Address: hopeact@mail.therealyb2016.com. Email replies and saved drafts are shared with the permitted Circle accounts. For an anonymous message, use the open care form. For a private Administrator privacy request, use Privacy Requests & Appeals.

People And Access

Five roles keep the committee connected and the work moving.

Convener

Brings people together and helps meetings move forward.

Records & Decisions

Maintains a clear record of decisions and follow-through.

Member Care & Development

Supports connection, participation, and member development.

Get Free MN Liaison

Carries the committee's needs and updates to Get Free MN.

Administration and Technology

Supports the Hub, systems, access, and committee infrastructure.

Open **Menu → Coordinator Circle → View Role & Work** to see the current role holder and connected work. Committee Co-Chair roles are separate from the elected Circle.

Member

What You Can Do: Explore shared work, create tasks, archive and restore old tasks, contribute to active sprints, update and complete assigned tasks directly, submit personal notes, respond to meeting availability, and share a care check-in.

What Stays Restricted: Shared inbox, Circle care records, and administrative actions.

Coordinator

What You Can Do: Update and complete assigned tasks, organize sprints and meetings, review research, and access shared care or email when that capability is enabled.

What Stays Restricted: Admin Tools, other members' private progress notes, and account administration.

Administrator

What You Can Do: Manage accounts and capabilities, tasks and schedules, events, completion and member follow-up, connections, privacy requests, and recovery tools.

What Stays Restricted: Confidential Board work belongs in its separate authorized system.

Capabilities can be adjusted by the Administrator. A Circle title alone does not grant app permissions.

Save, Cancel, And Confirmation

A confirmation tells you where your work stands.

Save

Sends the form’s changes to the Hub. Wait for its success message before leaving. If saving fails, keep the form open and read the explanation.

Cancel

Closes the editor. If changes are unsaved, choose **Keep Editing** or **Discard Changes**. Cancel does not undo a completed save.

Back

Returns to the previous workspace. Save or resolve the unsaved-change prompt before you leave an editor.

Private Draft Saved

A supported form has a private recovery copy. It has not been submitted for review. Reopen the same form to restore it; recovery is available for up to 30 days.

Status Updated

The owner’s status and next step were saved directly. No approval is needed.

Task Completed

The task is recorded as Completed; its history remains available.

Your Update Is Saved

A personal note from someone other than the assigned owner was saved for Administrator follow-up.

Draft Saved (Email)

Your email draft is saved and shared with permitted Circle accounts. It has not been sent.

Accepted For Delivery

The email provider accepted the send. Delivery and reading are separate events.

When A Connection Fails: Keep your writing open. Retry the same save or send as directed; check the record before creating a duplicate. If someone else changed the record, preserve your writing before loading the latest version. Offline editing is not supported.

Help And Everyday Habits

Start small, return often, and keep the next step visible.

A Useful Meeting Rhythm

Before: Open **Executive Dashboard** for priorities and decisions. Check the Shared Calendar and update your commitments.

During: Use Meeting Minutes to capture actual attendance, discussion notes, decisions, and follow-ups. Plan topics separately in Meeting Agendas.

After: Review finalized actions in The Tracker. Use **Visible Impact** to connect the committee's work to evidence and recorded decisions.

Open Executive Dashboard

Find What You Need

Use **Search Hub** in the header to find tasks, meetings, finalized decisions, sprints, calendar events, and partner profiles available to your account. Search by title, owner, pillar, or next step, then select a result to open the record.

Written Help

Open **Menu → Help & Tutorials** and choose a topic from the side menu or mobile Help Topic selector. Read the online User Guide or download its PDF for step-by-step help.

Use your browser's zoom for larger text. Press Tab to move between controls and Enter or Space to activate them. The Tracker also offers date fields as an alternative to dragging.

Open Help & Tutorials

Common Questions And Privacy

I Forgot My Password. What Should I Do?

Choose **Forgot Your Password?** on the sign-in screen. Use a previously saved recovery code or the supported Administrator-assisted recovery flow. If you have no usable recovery method, contact the Administrator. Never send a password or recovery code in email or chat.

Do I Need Another App For Passkeys?

No new account or app is needed for passkeys. Use **Account → Two-Step Sign-In** for the guided setup. Existing authenticator or text-verification protection remains available if already enabled. Set up your passkey on your own phone or computer.

Why Is A Button Missing?

The Hub shows controls according to your account and enabled capabilities. Ask the Administrator to check your role and permissions. A missing management button does not mean your contribution is unwelcome.

What Should I Keep Out Of The Hub?

Keep passwords, verification codes, account credentials, confidential Board records, and unnecessary sensitive personal information out of committee workspaces and email. Check who can see a record before saving it. The Privacy Policy explains audiences and processing.

For everyday account options, open Settings. Service setup and diagnostics are in Administrator Settings. The Administrator can connect Claude under Minutes Intelligence; connected analysis sends uploaded minutes and member names to Claude and uses the connected API account. See Help & Tutorials for optional guidance.